

Proposal for Consulting Services
Arlington Zoning Recodification

RFP #16-47 Consultant/ Zoning Bylaw Recodification
Technical Proposal

October 20, 2016



with
Robert Mitchell, FAICP
Robert W. Ritchie, Esq.



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INTRODUCTION



RKG Associates, Inc. is pleased to submit this proposal for consulting services to help the Town of Arlington review, recodify, and update its Zoning Bylaw.

Founded in 1981, RKG Associates, Inc. provides comprehensive planning, zoning, and economic development consulting services to public, private, and institutional clients. RKG has completed over two thousand consulting engagements since its inception. Today, we are one of the most well respected planning firms in the country, with offices in Boston, Alexandria, VA, and Atlanta, Georgia. Our work for Arlington will be led by RKG's planning group in Boston.

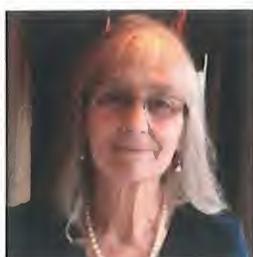
RKG has assembled an impressive team of consultants for this engagement. The core leadership team consists of three experienced, highly respected planners: Judi Barrett, Director of Municipal Services, and Eric Halvorsen, AICP, Senior Planner, both with RKG, and Robert P. Mitchell, FAICP. We are also very fortunate to have Robert W. Ritchie, Esq., as our legal advisor. Project team resumes can be found at the end of our proposal.

CONSULTING TEAM

RKG ASSOCIATES, INC.



Craig Seymour, Principal-in-Charge. Craig Seymour is President and Managing Principal with RKG Associates, Inc. He has over thirty years of experience in economic development and real estate planning. Mr. Seymour frequently works with communities seeking to strengthen their tax base and employment base, ranging from site development projects to regional plans. He also provides financial and economic analysis, strategic market studies, and target industry analyses to public and private clients. Mr. Seymour is a licensed commercial real estate broker and certified general appraiser with extensive valuation experience with business parks, development opportunities, and hospitality facilities.



Judi Barrett, Project Manager. Judi Barrett, RKG's Director of Municipal Services, has thirty years of planning and community development experience. She assists cities and towns on a wide variety of zoning projects, from updating use regulations or parking requirements to zoning audits and recodification and comprehensive revisions that include major map amendments. Her most recent Massachusetts zoning engagements have included recodification and update of the Medway Zoning Bylaw and Lenox Zoning Bylaw, inclusionary zoning for Framingham and Salisbury, and district-level planning and revised zoning for the Lafayette

Road-Main Street corridor in Salisbury. She is currently working with Bob Mitchell on zoning revisions for the Towns of Braintree, Hudson, and Arlington.

Ms. Barrett also leads local comprehensive plans – including the master plan Arlington completed a year ago – as well as neighborhood revitalization and housing plans, and community development strategies. She is well known for her work in inclusionary zoning and highly respected for her work in affordable and fair housing. As an “on call” consultant with the Massachusetts Housing Partnership (MHP), Judi frequently helps city and town boards with their review of affordable housing proposals. She is the lead author of MHP’s forthcoming Chapter 40B Handbook for Zoning Boards of Appeal.

Judi Barrett is a skillful presenter and public meeting facilitator. She is a frequent panelist and guest speaker at professional conferences and a guest lecturer for graduate-level planning students. As Community Development and Housing Committee Chair for APA-MA, she has organized half-day conferences on inclusionary zoning, and she is also a trainer both for APA-MA and the Citizen Planner Training Collaborative (CPTC). Ms. Barrett has organized workshop sessions for the APA National Conference, Southern New England American Planning Association (SNEAPA), New England Region NCDA conference, and others. Before joining RKG, Ms. Barrett served as Director of Planning with Community Opportunities Group, Inc., for seventeen years. She previously managed the Community Development Fund at Mass. Department of Housing and Community Development (DHCD), overseeing the state’s CDBG set-aside for non-entitlement cities and towns. She also served as Community

Development Director for the Town of Plymouth, MA.



Eric Halvorsen, AICP. Eric Halvorsen has over nine years of experience in land use and transportation planning. He graduated from Rutgers University with a degree in Environmental Planning and Design and graduated from the University of Illinois with a Master's Degree in Urban and Regional Planning. Prior to working at RKG Associates, Eric worked for the Metropolitan Area Planning Council as the Assistant Director for Transportation. In addition, he also worked in Illinois for a regional planning agency managing corridor studies, business district revitalization plans, and updating the agency's Long Range Transportation Plan.

Eric specializes in helping communities develop plans that bridge the topics of land use and transportation. This includes master plans, downtown plans, corridor plans, and site specific plans. Eric's focus is on formulation of realistic and actionable plans that can be achieved incrementally over time. He has experience working with municipalities to develop bicycle and pedestrian network plans, transit plans, and parking strategies. He also has significant experience with public engagement, crafting processes for groups as small as five and as large as 300. These include highly interactive open houses, site walks, town hall meetings, small group facilitation, focus groups, and project working groups. He believes in purposeful, meaningful, and inclusive engagement of all members of the community. Eric also received facilitation training from the Interactive Institute for Social Change (IISC).

Eric is a member of the American Planning Association, a member of the American Institute of Certified Planners (AICP), and was a founding Board member of the Boston Chapter of Young Professionals in Transportation.

ROBERT P. MITCHELL, FAICP



Robert P. Mitchell, FAICP has more than thirty years of experience at the local, state and private levels in authoring zoning ordinances and bylaws, planning studies, strategic plans, and sustainable development. Bob has been providing training to local officials at the state and national level for the past 20 years on both land use and zoning tools and techniques as well as administration, roles and responsibilities, ethics and meeting management issues. He is also an Adjunct Professor at UMass Amherst in addition to being a guest lecturer at numerous colleges and universities. Mr. Mitchell is the co-author of *Massachusetts Guidebook for Planning & Zoning*, a comprehensive guide to state planning, zoning, subdivision, and other land use regulations, statutes and court decisions. Prior to his own planning consultancy, he worked at the Massachusetts Office of Housing & Economic Development and Massachusetts Office for Commonwealth Development, and he was the Planning Director for Amherst, Massachusetts.

ROBERT W. RITCHIE, ESQ.



Robert W. Ritchie, Attorney, is well known in Massachusetts land use and planning circles. He formerly served as Town Counsel for the Town of Amherst for fifteen years and as director of the Municipal Law Unit in the Attorney General's Office for eleven years. At the Municipal Law Unit, Mr. Ritchie led the statutorily required review process for all town bylaws and charters. Mr. Ritchie also served as general counsel at the Massachusetts Department of Agricultural Resources for five years during the Patrick Administration. He is currently in private practice, serving Of Counsel with the firm Lampke and Lampke and as special counsel for numerous cities and towns. With Mr. Mitchell, Mr. Ritchie is co-author of the forthcoming *Massachusetts Guidebook for Planning & Zoning*.

RKG'S RECENT ZONING EXPERIENCE

Town of Braintree / Comprehensive Zoning Revision

Current Project; Estimated Completion, December 2017

(with Robert Mitchell, FAICP)

Braintree's comprehensive zoning revision process is the first major review and overhaul of the zoning bylaw in more than thirty years. The catalysts for the comprehensive revision are that Braintree recently adopted a city form of government, so all of the former town codes are

being updated; and second, the lack of clarity in Braintree's zoning has led to difficult-to-settle disputes between the Planning Department, Building Department, town boards, and applicants. Another motivating factor for this project is that over time, older industrial areas have gradually redeveloped for other uses, e.g., multifamily housing. As a result, the present zoning designation for several areas in Braintree is not consistent with the actual existing use. The work RKG is doing for Braintree includes both zoning map amendments and a recodified, updated, and easy-to-navigate Zoning Ordinance with illustrations of dimensional regulations and other content and visually interesting, easy-to-follow tables (uses, parking, and so forth).

Town of Lenox / Zoning Recodification and Update

Completed: May 2016

RKG's zoning work in Lenox involved reorganizing, cleaning up, and updating a zoning bylaw that had been recodified approximately seven years earlier. Town officials decided to move forward with updating and improving the zoning bylaw after hiring a new town planner who had the capacity to organize a zoning update project. Although the scope of work focused organization, structure, and clarity, the Town decided to tackle some policy-level issues as well, e.g., zoning on Route 7, allowing small-scale multi-family housing in the town center, moving toward more uses allowed by right in the town center. To test ideas for inclusion in the zoning revision, the Town Planner and Town Manager sponsored open house workshops on key topics so residents would have a vehicle to participate. These successful workshops and a well-received all-boards meeting brought credibility to the process and helped to secure passage of the proposed bylaw. In May 2016, the proposed Zoning Bylaw passed unanimously at town meeting.

Town of Northfield / Comprehensive Zoning Revision

Current Project; Estimated Completion, December 2016

(with Daphne Politis, AICP)

In 2012, the small town of Northfield embarked on a master plan update, hoping to reach consensus about reuse of a former prep school campus that had been vacant for eight years. As a result of the master plan process, Northfield realized that it had to modernize its zoning in order to create more options for redeveloping the mothballed campus. There were other issues, too, notably that the Town had come to rely on special permits for just about every land use decision. This had led to many local disputes and litigation. The Town hired a team led by RKG to rewrite the bylaw. The zoning revision process has involved a variety of public meetings and workshops, meetings with the Town's very small Main Street business association, and sessions with local farmers. Participation by these varied groups led to a new Zoning Bylaw with forward-thinking ways to encourage agricultural enterprises, village center business development.

Other recent zoning work includes the following:

Town of Salisbury / Lafayette-Main Zoning Revision
Completed May 2015

Town of Salisbury / Inclusionary Zoning Update
Completed September 2016

Town of Medway / Zoning Recodification
Completed May 2015

Town of Easton / Queset Commercial Corridor Zoning Revision
Completed May 2015
(with Attorney Mark Bobrowski)

Town of Framingham / Inclusionary Zoning Update
Completed August 2015

Town of Groton / Business District Zoning Revisions
Phase II, Groton Master Plan
Completed December 2014

Town of Needham / Needham Center Zoning Revision
Completed 2010*

Town of Northborough / Comprehensive Zoning Revision
Completed 2009*

City of Beverly / Inclusionary Zoning Ordinance
Completed 2007*

**Projects completed by Judi Barrett while employed at another firm.*

APPROACH & PLAN OF SERVICES

This section of our proposal presents the RKG Team’s understanding of the project and approach to working with the Zoning Recodification Working Group (ZRWG), Department of Planning and Community Development (DPCD), the Arlington Redevelopment Board (ARB), and the public in recodifying and updating the Arlington Zoning Bylaw.

OVERVIEW

The RKG Team’s work in Arlington will focus on creating a document that is clearly written, internally consistent, and easy to navigate, and that is consistent both with the state Zoning Act and case law. The Zoning Bylaw should reflect modern planning practices and provide for predictable, orderly administration and permitting procedures. Furthermore, it should provide a solid foundation for future amendments to implement the goals and policies of the Arlington Master Plan.

In restructuring and updating Arlington’s Zoning Bylaw, we will explore options for streamlining and consolidating existing regulatory provisions to make the Zoning Bylaw easier to understand and administer. During the drafting phase, the RKG Team will focus on:

- Understanding the needs of users of the Zoning Bylaw and of stakeholders affected by decisions made in drafting and implementing the Bylaw.
- Identifying issues of concern related to the organization and substance of existing regulations.
- Proposing options for ways to structure the new Zoning Bylaw to streamline administration and to achieve desired objectives.
- Working closely with the Town in drafting new zoning provisions and responding to local needs.
- Achieving clarity and consistency.

WRITING ZONING BYLAWS

While the Town may want to “encourage” certain types of development, the real rules that ultimately define the built character of individual cities and towns are in the zoning regulations. Keeping in mind the potential for zoning to affect Arlington’s future, we are always sensitive to the economic, social, and environmental settings where we work, so that our recommendations for needed changes in the development review process produce the intended results. To ensure that our work on the Zoning Bylaw meets the Town’s needs, we will focus on several key questions for development review.

- How can the Zoning Bylaw encourage the types of development that Arlington desires and regulate the timing and intensity/density of development?
- How can the Zoning Bylaw provide for streamlined review and certainty in the approval process for projects conforming to town plans and policies?
- How can the Zoning Bylaw address nonconformities?
- How can the Zoning Bylaw promote high-quality development and redevelopment and effectively help to improve property values?
- How can the Zoning Bylaw help to protect natural areas?
- How can the Zoning Bylaw maintain historic and neighborhood character, where desired, while still providing for new development in appropriate locations?
- What alternatives to the Town's current enforcement procedures should be considered that may be more "user-friendly," yet still effective, fair, and legally enforceable?

WORK PROGRAM

Below is an outline of our proposed approach to all phases of the project. Although we have organized our task list a bit differently from the sequence outlined in the Town's RFP, we have included all of the tasks and services requested by the Town. The RKG Team's work program is organized into tasks that flow from project initiation to publishing the final Zoning Bylaw. The task descriptions that follow present our approach to data collection, issues identification, alternatives analysis, and preparation of the Bylaw. The lead team members for each sub-task are identified following the sub-section heading. All deliverables shall be provided in the format(s) and quantities specified in the Town's RFP.

TASK 1: START-UP AND INITIAL MEETINGS

The objective of this task will be to obtain and compile background information about Arlington's existing Zoning Bylaw and Zoning Map.

- 1.1. **Organizational Meeting with Staff; Town Tour.** [Barrett, Mitchell] An initial meeting will be held with RKG's team leaders and Town planning staff to review existing Bylaws, relevant plans and studies, local priorities. Information needed for the Zoning Bylaw will be gathered, and additional information will be assembled, including existing Town Bylaws, plans and maps, and details on the status of any major proposed development projects. RKG's Team will seek input from Town staff about communities Arlington generally considers "comparable" for purposes of researching recent zoning initiatives and successful zoning adoption and implementation. These and other communities may be tapped as "case study" examples during later phases of the Zoning Bylaw revision process.

1.2. Existing Plans, Policies, and Bylaws. [Barrett, Halvorsen] In addition to existing Bylaws and plans, we will review existing procedures for development application, review, approval, permitting and enforcement. We also will look at the procedures of other bodies operating under non-zoning local Bylaws and regulations in order to understand the overall structure of Arlington's development review and permitting requirements. A work session will be held with Town staff to review the findings of this analysis and a preliminary list of issues to be addressed.

1.3. Kick-Off Workshop with DPCD, ZRWG. [Barrett, Mitchell, Halvorsen] RKG's team leaders and Town staff will meet with the ZRWG to discuss their concerns about and ideas for the Zoning Bylaw. The objective of these meetings will be to give steering committee members the opportunity to describe their priorities for the process, identify geographic areas of concern.

1.4. Public Participation Plan. Based on input at the kickoff meeting, the RKG Team will prepare and submit a detailed community participation plan, including target dates for key events (e.g., public workshops), meetings with the ZRWG, plans for a project page on the Town's website, social media, "meeting-in-a-box" opportunities, and so forth.

Meetings: Start-up meeting with Town Staff; official kickoff meeting with ZRWG

Products: Meeting Notes, Photography (from Town Tour)

Est. Timeline: November – December 2016



TASK 2: ZONING DIAGNOSTIC

The objective of this task will be to identify issues of concern with existing Bylaws and procedures, from a variety of perspectives, including applicants and staff responsible for interpretation and enforcement of Bylaw provisions, and for the consulting team to conduct an independent code review for technical and legal issues that need to be addressed in the Zoning Bylaw revision. This work will build on the preliminary zoning audit that RKG worked on during the master plan process.

2.1. **Zoning Audit.** [Barrett, Mitchell, Halvorsen] RKG will conduct an independent analysis and evaluation of the existing Zoning Bylaw to identify strengths and weaknesses in terms of the following:

- Structure and format,
- Ease of access and navigability,
- Clarity of language and presentation,
- Internal conflicts and inconsistencies,
- Obsolete or missing provisions,
- Updates to implement recently completed plans, if any,
- Provisions that need to be updated to conform with Chapter 40A and current case law, and
- Other matters deemed significant by the consulting team, based on our review of the Zoning Bylaw and administrative regulations.

As part of this task, we will review recently adopted amendments to the Zoning Bylaw in order to understand how the Town is approaching its master plan implementation priorities. We also will review a selection of recent local decisions (e.g., special permit, site plan, variance, Section 6 findings) and recent land use litigation (if any) involving the Town of Arlington.

2.2. **Informational Interviews.** [Halvorsen, Mitchell]

We propose to conduct individual and group interviews during two day-long sessions and one evening session. The interviews should include a representative cross-section of stakeholders (such as department staff; members of the ARB and Board of Appeals, and other Town boards as appropriate; community leaders; environmentalists; members of the business community, developers, engineers, lawyers, etc.) so that we can gain an understanding of the varied concerns and experiences of user groups. These interviews will provide an opportunity to discuss issues identified by those using, administering, and adopting the Zoning Bylaw.



2.3. **Field Studies.** [Barrett, Halvorsen, Akbar] Based on our independent review of the Zoning Bylaw and Zoning Map and input from the stakeholder interviews, RKG will identify four or five areas of Town that can be used as “issues” case studies. The purpose of these case studies will be to provide recognizable “on the ground” illustrations of problems either created by the existing Zoning Bylaw or that cannot be addressed without land use policy changes. Case study locations will be identified by RKG in consultation with Town staff.

- 2.4. **Zoning Diagnostic Report.** [Barrett, Mitchell, Halvorsen] The Zoning Diagnostic Report will be prepared, summarizing key issues that arise during the interviews, review of existing local regulations and procedures, review of the Zoning Map, and our field studies. It will serve to guide and focus our work in drafting the Zoning Bylaw.
- 2.5. **Regulatory Options and Framework Paper** [Barrett, Mitchell, Halvorsen]. Based on issues highlighted in the Zoning Diagnostic, the RKG Team will propose optional ways to address the policy choices that arise in drafting the Bylaw. Options will focus on ways to consolidate and streamline the Town's existing zoning regulations.
- 2.6. **Preliminary Outline of New Bylaw.** [Barrett] A detailed, annotated outline of the structure of the recodified Zoning Bylaw will be prepared. This outline will identify all sections of the Bylaw. The outline will include references to existing Bylaw provisions for each new proposed part and chapter to facilitate comparison with existing Bylaws. This outline will serve as the starting point for the preliminary draft of the Zoning Bylaw.
- 2.7. **ZRWG Meeting.** [Barrett, Mitchell] The RKG Team will meet with the ZRWG and Town staff to present and receive comments on the Zoning Diagnostic Report and discuss its implications for the rest of the project.

Meetings: Interviews (Individual and Group); ZRWG Meeting

Products: Zoning Diagnostic and Issues Report; Meeting Notes

Est. Timeline: by February 15, 2017

TASK 3: PRELIMINARY DRAFTS OF THE ZONING BYLAW

RKG proposes to draft and revise the updated Zoning Bylaw using a first- and second-reading draft and hearing draft process with interim reviews by staff and the ZRWG. Responses to comments on the first-reading draft will be addressed in the second-reading draft, and so forth. Through this process, which we have used successfully in the past, RKG will be able to work closely with the Town to develop a Zoning Bylaw that meets Arlington's unique needs.

- 3.1. **First Reading Draft.** [Barrett, Mitchell; review by Ritchie] Working with feedback on the Framework Paper and Outline, RKG will prepare a first reading draft of the Zoning Bylaw. This effort may preserve some existing sections "as is" or relocate them to new sections, and for any revisions that involve amendment to the Zoning Map, we will append draft maps to the draft Bylaw. Throughout this process, we will work to consolidate provisions in a way that streamlines and better organizes the regulations, ensures that the provisions work effectively together, eliminates inconsistencies among various parts of the Bylaw, incorporates a "plain language" voice accessible to a wide variety of users, and addresses the Town's Project Objectives. Timeframes will be structured for staff and the ZRWG to provide detailed written comments on each part of the Bylaw. RKG will meet with staff to review a complete draft that responds to earlier staff comments. In RKG's experience, the first reading draft is the most time-

consuming step in the drafting process. This is because the review period typically brings out both technical and policy issues that still need to be discussed and reconciled by the Town. Good examples are lingering disagreements about where authority should lie for granting special permits and how much flexibility the Town wants to allow for extending or changing nonconforming uses.

3.2. **Second Reading Draft (Preliminary Draft).** [Barrett, Mitchell] The second reading draft will reflect RKG's response to comments on the first reading draft. In RKG's experience, the second reading draft largely resolves technical issues (format, corrections) identified in the first reading draft, but may still generate policy-level discussions either about the draft Zoning Bylaw or issues with the Zoning Map. The third reading draft is the "consensus version" and constitutes the Preliminary Draft Bylaw.

Meetings: Work Session Meetings with ZRWG and Staff; Public Meeting (Third Reading Draft)

Products: First- and Second-Reading Drafts, Preliminary Draft Zoning Bylaw and Map

Est. Timeline: By June 30, 2016

TASK 4: HEARING DRAFT OF THE ZONING BYLAW AND ZONING MAP

The objective of this task is to revise the Preliminary Draft in response to comments received under Task 3. The Hearing Draft of the Zoning Bylaw will be an attractive, consistently formatted, user-accessible document.

4.1. **Hearing Draft Bylaw.** [Barrett, Mitchell; review by Ritchie] Based on comments received from Town staff, the ZRWG, Board of Selectmen, ARB, and Board of Appeals, RKG will revise the Preliminary Draft Bylaw and prepare a Hearing Draft. Depending on the Town's preferences, the Hearing Draft may include illustrations, color-coded tables, and other visual aids to assist users of the Zoning Bylaw. It will have a detailed Table of Contents and an index. The accompanying Zoning Map (if changes are required) will be presented at the same time. The RKG Team will meet with Town staff in preparing the Hearing Draft to review final revisions.

Meetings: Meeting with Town Staff

Products: Hearing Draft Zoning Bylaw and Map

Est. Timeline: By August 31, 2017

TASK 5: PUBLIC REVIEW AND ADOPTION

The objective of this task will be to take the Draft Bylaw through public meetings and hearings and assist in the adoption process.

- 5.1. **Public Review.** [Barrett, Mitchell] Working with the ZRWG, the RKG Team will present the Hearing Draft at a public hearing conducted by the ARB. For purposes of this proposal, we assume we will be needed at two public hearings with the ARB prior to Town Meeting.
- 5.2. **Final Zoning Bylaw.** [Barrett, Mitchell] If necessary, the Hearing Draft will be revised based on input obtained at the public hearing. The final Zoning Bylaw will be prepared for adoption at Town Meeting. The consultants will attend Town Meeting and assist with presenting the revised and updated Zoning Bylaw.

Meetings: ARB public hearing(s); Town Meeting

Products: Final Zoning Bylaw

Est. Timeline: By September 2017

TASK 6: PLANNING AND ZONING BOARD REGULATIONS

The objective of this task is to provide administrative rules and regulations for the ARB and Zoning Board of Appeals. It is anticipated that as part of the Zoning Bylaw revision process, text that can be moved from the Bylaw to rules and regulations will be relocated accordingly in order to streamline the Bylaw and give the boards flexibility to adopt and revise their regulations as needed.

- 6.1. **Draft Rules and Regulations.** [Barrett, Halvorsen] RKG will provide draft administrative rules and regulations, including submission requirements and procedures, fees, use of technical review consultants, and so forth.
- 6.2. **Adoption-Ready Rules and Regulations.** [Barrett, Halvorsen] RKG will provide a final set of rules and regulations in editable form (presumably MS Word) and PDF.

Meetings: Review meeting with Town staff

Products: Administrative rules and regulations

Est. Timeline: By November 30, 2017

Town of Arlington Proposal for Zoning Recodification Assistance

REFERENCES

Project: Comprehensive Zoning Revision (2009)

Town of Northborough

Kathryn Joubert, Town Planner

Phone: (508) 393-5019

Email: kjoubert@town.northborough.ma.us

Other projects: Affordable Housing Plan (2011); Community Development Plan (2004); Board Training, Chapter 40B Comprehensive Permits

Project: Master Plan (2003), Zoning Recodification & Update (2016)

Town of Tewksbury

Steven Sadwick, AICP

Phone: (978) 640-4370

Email: ssadwick@tewksbury-ma.gov

Project: Revie, Revision, Update: Salisbury Beach Overlay District, Inclusionary Zoning

Neil Harrington, Town Administrator

Phone: (978) 462-8232, ext. 101

Email: nharrington@salisburyma.gov

Other projects: Lafayette-Main Zoning Revision (Area Plan); Village Center District, Village Residential District

Project: Zoning Recodification and Update (2015-2016)

Town of Lenox

Land Use Director and Town Planner Gail Miller, AICP

Phone: (413) 637-5500;1203

Voice: gmiller@townoflenox.com

PROPOSAL ATTACHMENTS

RESUMES

Craig R. Seymour

Judi Barrett

Eric Halvorsen, AICP

Robert W. Mitchell, FAICP

Robert W. Ritchie, Esq.

PROPOSAL FORMS & CERTIFICATIONS

Certificate of Non-Collusion

Certificate of State Tax Law Compliance

Town of Arlington Proposal for Zoning Recodification Assistance

CRAIG R. SEYMOUR, MANAGING PRINCIPAL

PROFESSIONAL PROFILE

Mr. Seymour's primary area of expertise includes economic analysis, financial forecasting, strategic planning, feasibility analysis, real property valuation, transportation and project management. He has over twenty-five years of extensive experience in economic development, the socioeconomic evaluation of major projects, business and community planning and redevelopment financing. His responsibilities include management of the firm's economic and financial oriented consulting services, including the appraisal and research functions.

EDUCATION

- AB in Economics/Civil Engineering; Brown University, Providence, Rhode Island
- Masters of Business Administration (MBA); University of New Hampshire

PROFESSIONAL AFFILIATIONS

- Affiliate Member: Appraisal Institute
- Association of Defense Communities
- National Association of REALTORS

LICENSES

- Real Estate Broker
- Certified General Appraiser

PROJECT EXPERIENCE

Real Estate Analysis & Evaluation

Development Studies

Working with local land planners and engineers, analyzed the market potential for an historic building located on a prime riverfront parcel near downtown Jacksonville, Florida. The architecturally unique former industrial building could serve as a catalyst for neighborhood revitalization, provided sufficient public and private investment could be rationalized.

Downtown Revitalization

Worked with the State of Connecticut's Department of Community and Economic Development to analyze a proposed public initiative to revitalize the downtown of a mid-size city through selective public investments and support for private developers.

Master Planning

Prepared a real estate market analysis as part of a master plan for 400 acres in southern Rhode Island. The land uses envisioned for the site include highway retail, office, industrial (flex-tech & distribution) and corporate headquarters. Residential use, specifically age-restricted housing, was also considered along with the need for community facilities and recreational uses.

Transit Oriented Development (TOD)

Managed the research and analysis of the impacts and opportunities surrounding the proposed closure of the Town of Andover (MA) public works yard located between the MBTA commuter rail station and downtown. The 15 acre site presented multiple options for sustainable mixed-use development. RKG's work focused on market demand, economic impacts and fiscal requirements.

Undertook detailed real estate supply and demand studies for MAPC for neighborhoods surrounding commuter rail stations in Beverly, Melrose and Quincy, MA. RKG evaluated the neighborhood context and site characteristics of each location and other issues that would influence development. Housing trends and household tenure characteristics were analyzed to ascertain strengths (or weaknesses) with each location. Market conditions were analyzed to understand pricing levels and supply. Future demand was estimated by age/income cohorts to identify key clusters that could be targeted for new construction.

Managed the economic and fiscal impact analysis for public financing of a new commuter rail station at the New Balance world headquarters in Brighton, MA. As part of the Commonwealth's I-Cubed financing program, future revenue streams such as sales and income taxes may be pledged to repay bonded debt for public investments. RKG prepared estimates of future revenues for each "use" of the mixed-use Boston Landing, along with associated costs in order to estimate the net revenues available to address the public infrastructure costs associated with the multi-million dollar project.

Economic Development and Urban Revitalization Projects

Housing Market Research

Advised a major national homebuilder on the market potential for high-end condominiums in downtown Providence, Rhode Island. The proposed project, a relatively new concept for the area, was highly successful in terms of market acceptability, with the units selling out faster and at higher prices than anticipated.

Public Financing Strategies

Assisted a community throughout a comprehensive redevelopment program to transform a former hospital into a large mixed-use housing development. Services included contributing to the master planning effort, analysis of financial impacts, negotiation for the acquisition and subsequent sale of the property to a preferred developer chosen through a competitive evaluation process, and analysis of the fiscal impacts of alternative development strategies.

Regional Economic Development

Developed the market feasibility and financial plan for a 300-acre high-tech business park in central Maine that is funded through a unique tax-sharing strategy between 24 communities and a newly formed development authority. Work included determination of an equitable funding formula, which included a UDAG grant and a fiscal impact analysis for the host community.

Waterfront Development

Prepared an in-depth economic feasibility analysis for the redevelopment of a 70-acre waterfront site in Key West, Florida involving a major hospitality training center, mixed-use commercial/retail development and twenty-six units of affordable housing.

Transportation

Socioeconomic Impacts

Project manager for DEIS components for expansion of Philadelphia International Airport and T.F. Green Airport in Providence, RI.

Development Impacts

Oversaw analysis of the potential impacts on businesses in downtown Skowhegan, Maine of a proposed by-pass around the village center.

Market Analysis/Development Potential

Managed the economic and market analysis components for the Trenton Intermodal Gateway Project for the National Park Service on Mount Desert Island/Bar Harbor, Maine.

Economic & Fiscal Impact Analysis

Economic Impact Studies

Prepared an analysis of the fiscal and economic impacts associated with a large multi-use development project located on the South Shore of Massachusetts. The project, which includes 730 housing units and 300,000 square feet of retail and offices space, is being developed under the new "Smart Growth" legislation (Chapter 40R), which encourages higher density, transit-oriented development.

Environmental Impact Studies

Managed the analysis of economic and social impacts associated with the EIS process for the expansion of two major east coast airports. Analyzed the impacts associated with a very large, long-term rural transportation initiative.

Fiscal Impact Studies

Provided professional peer review for a suburban community facing a major transit-oriented development. The proposed mixed-use project will eventually include over 1,000 residential units and 4.5 million square feet of retail and office space.

Military Base Redevelopment

Economic Development

Principal consultant to local redevelopment authorities for the creation of public benefit and economic development conveyance (EDC) applications at former military facilities in Connecticut, Texas, Tennessee, New Hampshire, California, Maine, Indiana, Illinois, and Florida.

Financial Analysis

Developed comprehensive business plan for the acquisition and long-term redevelopment of Cecil Field in Jacksonville, Florida. This 5,700 acre former Navy master jet base is now considered a major future employment center for aviation dependent, manufacturing and distribution industries as well as a location for significant new public recreation infrastructure.

JUDI BARRETT, DIRECTOR OF MUNICIPAL SERVICES

PROFESSIONAL PROFILE

Judi Barrett is the director of RKG's Massachusetts office. Her areas of expertise include planning, zoning, housing and community development, and socioeconomic impact analysis. With over twenty-five years of experience in planning and community development, Judi has worked on a wide variety of engagements: comprehensive plans, housing plans and housing need studies, HUD Consolidated Plans, downtown plans, zoning ordinances and bylaws, development impact studies, and strategic plans. Judi has created innovative, award-winning plans for cities and towns and she is widely respected for her citizen participation work.

Judi manages most of RKG's planning services for local government clients in New England. She is a frequent panelist and guest speaker at professional conferences and a guest lecturer for graduate-level planning students. As Community Development and Housing Committee Chair for APA-MA, she has organized statewide conferences on inclusionary zoning, and she serves as a trainer both for APA-MA and the Citizen Planner Training Collaborative. Judi has led workshops for the APA National Conference and numerous regional conferences as well.

Before joining RKG, she served as planning director for Community Opportunities Group, Inc., and CDBG program manager for the Massachusetts Department of Housing and Community Development (DHCD). She previously worked for the Town of Plymouth (MA) as community development director, where she led highly successful housing, economic development, and tourism programs, including a downtown revitalization initiative.

EDUCATION

- AB in History and Government; Harvard University, Cambridge, Massachusetts
- Graduate coursework in planning, land use law, and public finance at Harvard, Tufts University, and UMass-Boston

PROFESSIONAL AFFILIATIONS

- American Planning Association, and Massachusetts Chapter (APA-MA) Board: Chair, Community Development & Housing Committee
- Massachusetts Association of Planning Directors (MAPD)
- Urban Land Institute (Boston), Housing and Economic Development Product Council

RELEVANT PROJECT EXPERIENCE

Comprehensive Master Plans

Sample Projects: Lincoln, Groton, and Dedham, MA
Judi Barrett has led teams of consultants to prepare master plans for eighteen cities and towns. In each case, she was responsible for coordinating the work of staff and subcontractors, designing and conducting the public participation process, conducting a zoning audit and developing the future land use plan, and taking the lead role in preparing the housing and economic development components of the plan. Her master plans for the towns of Dedham and Lincoln, Massachusetts, won Outstanding Comprehensive Plan Awards from the Massachusetts Chapter of the American Planning Association (APA-MA). For Groton, she worked with the Town through the first phase of zoning implementation, writing new zoning for the business districts and a new Site Plan Review bylaw.

Town Center Planning and Zoning

Sample Project: Needham, MA Needham Center Plan
As subcontractor to an urban design firm, Judi Barrett prepared a feasibility analysis for sample sites and wrote new zoning for redevelopment in Needham Center. The zoning includes incentives for multifamily units over commercial space and incorporates design standards to accommodate the additional density.

Inclusionary Zoning Ordinance

Sample Project: Beverly, MA
Judi Barrett has worked nationally on inclusionary zoning. An example of her success with zoning for

affordable housing is the award-winning inclusionary zoning ordinance that she wrote for the City of Beverly (MA). The ordinance mattered to City officials because Beverly had passed the state's threshold for "mandatory" affordable housing permits (Chapter 40B), so without regulatory reform, the City did not have a way to incentivize affordable housing development. The ordinance provides significant as-of-right cost offsets for developments that include affordable units on site while still creating other avenues for developers to provide affordable housing. The ordinance has been very effective for creating new affordable housing in the downtown and other "smart growth" neighborhood commercial centers.

Comprehensive Zoning Revision

Sample Project: Northborough, MA

Judi Barrett worked with the Northborough Planning Department, Planning Board, and Zoning Board of Appeals on a comprehensive revision of the town's Zoning Bylaw. The project involved over 50 committee and subcommittee meetings, numerous public hearings, and zoning map amendments to align Northborough's land use regulations with many changes that had occurred in the town since the last major zoning revision was done twenty years earlier. The new zoning includes neighborhood development incentives for a variety of housing types and more flexible rules for downtown development. Revisions to the zoning map eliminated "split lot" problems that had discouraged development proposals in the past.

Housing Plans and Studies

Sample Project: Falmouth, MA Housing Demand Study and Needs Analysis

Judi Barrett worked with the Falmouth Planning Department on a comprehensive housing demand study and needs analysis. For this project, she obtained and analyzed a wide range of demographic and market data for the Town as a whole and each of its villages in an effort to identify minority and low-income concentration areas. She also completed a regulatory review and conducted an extensive housing policy and housing development capacity analysis and identified ways for the Town to improve in-house advocacy and project review skills. RKG won a Planning Project Award from APA-MA for Judi's work in Falmouth.

Development Impact Analysis

Sample Project: Hopkinton, MA Legacy Farms

As consultant to the Hopkinton Planning Board and Town Attorney, Judi Barrett analyzed the impact of Legacy Farms, a 940-unit housing development, and assisted with negotiating the terms of a Host Community Agreement (HCA). The project preserved 500 acres of open space and created a mix of housing, including affordable apartments in a town with very expensive homes. It also brought over \$1 million in transportation improvements and development of a new drinking water supply in East Hopkinton. Since negotiating the original HCA, Judi has helped Hopkinton evaluate the financial impact of two changes proposed by the developer.

Development Impact Analysis

Sample Project: Plymouth, MA Plymouth Rock Studios

The Plymouth Town Manager and Planning Department hired Judi Barrett to prepare a comprehensive economic and fiscal impact analysis of Plymouth Rock Studios, a proposed film production studio known locally as "Hollywood East." The project was slated for a 240+/- acre site in South Plymouth. The applicants sought zoning changes and tax relief from the Town, and special financing from the state, in order to lure the film production industry to Massachusetts and capitalize on the state's film production tax credits. Ultimately the project did not proceed due to questionable job creation projections and legal problems involving one of the developers.

Neighborhood Revitalization Strategy Area (NRSA) Plans

Sample Projects: Lawrence, MA; Hartford, CT; Davisville (North Kingstown), RI

From her years of Community Development Block Grant (CDBG) experience, Judi Barrett has developed Neighborhood Revitalization Strategy Area (NRSA) designations for very-low-income neighborhoods in several communities. NRSA approval from HUD (or the state program) allows CDBG grantees to administer eligible housing and community development programs under more flexible national objective requirements, thereby making service delivery strategic and more efficient.

ERIC HALVORSEN, AICP, SENIOR PROJECT ANALYST

PROFESSIONAL PROFILE

Mr. Halvorsen's primary areas of expertise include land use, zoning, transit oriented development, transportation, and public participation. He has over nine years of experience in community revitalization and regional planning. His responsibilities include planning services for municipal clients, research and writing, and civic engagement.

EDUCATION

- BS in Environmental Planning and Design; Rutgers University, New Brunswick, New Jersey.
- Masters of City and Regional Planning, University of Illinois, Champaign-Urbana, Illinois.

PROFESSIONAL AFFILIATIONS

- American Institute of Professional Planners
- American Planning Association
- Urban Land Institute
- Young Professionals in Transportation

PROJECT EXPERIENCE

Community Planning

Transit Oriented Development (TOD)

Managed a research and place-based planning program that undertook TOD station area plans in 8 municipalities centered around the MBTA's rapid rail and commuter rail system. The plans included an analysis of the current real estate supply and demand for the neighborhoods surrounding the stations and issues that would influence new development opportunities.

The projects also identified and offered recommendations for addressing regulatory issues in zoning and permitting, as well as transportation connectivity. The resulting plans helped catalyze the construction of mixed-use and multi-family housing developments in several of the communities and spurred successful applications to state programs for investments in key infrastructure projects.

Downtown Revitalization

Prepared a downtown revitalization action and implementation plan for the Town of Framingham, MA which built upon the existing vision established by the community in 2009. The action plan was focused on understanding the market for new

development, the challenges of financing development in Downtown, and addressing the

regulatory barriers through significant zoning changes. The process also included a multi-lingual public engagement component with several focus group meetings and a large interactive open house.

Transportation Planning

Managed programs and completed plans for municipal-wide bicycle and pedestrian infrastructure and parking management. Developed specific recommendations for improving multi-modal transportation access across communities. Completed feasibility studies for improving public transit access across multiple municipalities.

Real Estate Economics

Constructed a scenario-based development feasibility model for the City of Somerville to test the impact of increasing their inclusionary housing percentage. The model helps city staff and policy makers understand the impact municipal regulations can have on residential development in Somerville.

Zoning

Constraints and Opportunities

Developed a parcel-by-parcel build out analysis for several downtown locations in the Greater Boston region to better understand the implications of current zoning regulations on the built environment. Recommended zoning changes based on the outcome of the build out analysis that would help make new projects financially feasible and improve overall site and building design.

Design Guidelines

Created a supplemental design guideline booklet for communities to help integrate new development into the historical framework of their downtown.

Public Engagement

Developed and implemented public engagement processes for groups as small as 10 and as large as 300. Engagement efforts included focus groups, site walks and tours, interactive open houses, small group exercises, and large town hall meetings. Engagement sessions have been held in multiple languages with interpretation and translation of written materials. Mr. Halvorsen has been trained as a facilitator by the Interactive Institute for Social Change (IISC).

Robert W. Ritchie, Attorney
Amherst MA
413-531-2431
Bobritchie@comcast.net

Education

- Boston College; AB in Classical Languages and Philosophy
- University of Massachusetts Amherst; Masters in Philosophy
- Boston College School of Law; JD

Experience

- Private Practice – Of Counsel with Lampke and Lampke
 - Currently special counsel for several Massachusetts cities and towns
 - Parliamentarian for the City of Boston School Committee
 - Co-author of the *Massachusetts Guidebook for Planning & Zoning*
- General Counsel for the Massachusetts Department of Agricultural Resources, 5 years
- Assistant State of Massachusetts Attorney General & Director of the Attorney General's Municipal Law Unit, 11 years
- Town of Amherst – Town Counsel, 15 years
- Assistant Attorney General for the State of New Hampshire

Professional Activities

- Massachusetts Municipal Lawyers Association (MMLA), long-time member, past President, current webmaster
- International Municipal Lawyers Association, long-time member and past Board of Director member
- Massachusetts Continuing Legal Education (MCLE), Frequent presenter and author of legal educational program materials

Robert P. Mitchell FAICP
151 Tremont Street Suite 23A,
617-512-9751
MitchellFAICP@gmail.com

EXPERIENCE

ROBERT P. MITCHELL FAICP, PLANNING CONSULTANT 2011 - present

- Provide consultant services to municipalities, private and non-profit businesses and organizations. Services include sustainable development plans and programs; comprehensive and strategic planning; innovative zoning tools and techniques; corridor planning; grant writing; housing studies; development and plan review; and downtown revitalization.
- Projects include:
 - Co-author - *The Guidebook to Massachusetts Land Use Planning & Zoning* – 2015
 - *Vision Plan* – Town of Hopkinton - 2015 Visioning process for the Town of Hopkinton – Lead consultant on organizing and facilitating public outreach process, including public workshops and public survey; Vision Plan adopted by Board of Selectmen
 - *Housing Plan* – Town of Reading – Co-authored the town's Housing Plan. Adopted by Board of Selectmen
 - *Housing Trust Fund Report* – Town of Reading – Produced a report on the organization and use of housing trust funds and a housing trust fund board.
 - Town of reading Zoning Bylaw - Reviewed sections of Reading's zoning bylaw and made recommendations for revision;
 - Town of Norwood – Authored successful State Downtown Initiative Program grant for downtown revitalization efforts.
 - *Strategic Plan* – Authored plan for the Citizen Planner Training Collaborative.
 - Conducted research on zoning issues for a number of private sector clients.
 - Provide training programs to public officials, planners and others on land use and zoning topics, ethics, meeting management and administrative topics.

ADJUNCT PROFESSOR UNIVERSITY OF MASSACHUSETTS, AMHERST 1988-present

Adjunct Professor in the Department of Landscape Architecture & Regional Planning since 1988. Taught both Graduate and Undergraduate courses including City Planning, an introductory seminar course; Tools & Techniques of Planning, a graduate level in-depth course on planning techniques; Planning & Law; and the 2nd year graduate student Studio Course.

SPECIAL ASSISTANT FOR PLANNING INITIATIVES – STATE OF MASSACHUSETTS 2007 - 2011

Special Assistant in the Executive Office of Housing & Economic Development. Responsibilities included:

- *South Coast Rail Economic Development & Land Use* plan & project - Co-managed the development & implementation of the national and state award winning. Coordinated the 31 communities & 3 regional planning agencies in the region to update zoning, planning, housing, TOD and open space plans and regulations. Developed and implemented Smart Growth initiatives in the region. Co-authored and implemented the Governor's Executive Order 525 to coordinate state agencies in aligning their plans, programs and financial investments with the plan recommendations.
- *495/MetroWest Regional Corridor Planning Compact* plan – Chaired steering committee and managed the initial development of the plan with 37 communities, 2 regional agencies and 2 non-profit organizations to study land use, transportation and infrastructure issues & needs in the MetroWest region.
- *State Regional Planning Framework Strategic Plan* - Developed and managed the Initiative, a grant program to conduct local studies on priority growth and priority preservation measures.

Robert P. Mitchell FAICP

- Technical Assistance - Provided assistance to cities/towns on planning & zoning issues. Provided training to local officials on zoning and planning tools & techniques for sustainable development.
- Zoning Reform Task Force - Provided staff support to the as part of the effort to comprehensively revise and update the State Zoning Act.

SPECIAL ASSISTANT FOR SUSTAINABLE DEVELOPMENT - STATE OF MASSACHUSETTS 2004 - 07

Special Assistant for the Office for Commonwealth Development which was charged with leading State agencies and Massachusetts communities in furthering sustainable development and Smart Growth efforts.

- Developed and administered the Commonwealth Capital program, which directed state capital spending toward Smart Growth communities, locations and projects.
- Provided technical assistance to cities and towns on issues such as sustainable development, zoning changes, transit-oriented development, and similar.
- Chaired the State Interagency Sustainable Development Team that developed policy recommendations, reviewed grant applications, led technical assistance efforts, developed a Smart Growth/Smart Energy Toolkit, and organized the annual statewide Smart Growth conference.
- Built partnerships with other public entities, non-profits and the private sector, to advance the cause of sustainable development. Led work sessions, conducted presentations and charettes on these topics.
- Member of the TOD Infrastructure & Housing Support program. Provided technical assistance and funds to TOD related projects.

DIRECTOR OF PLANNING – AMHERST, MASSACHUSETTS

Planning Director (18 years) responsible for planning and community development , including innovative land use and zoning mechanisms, comprehensive planning, housing, economic development, grants, strategic plans, growth management, design review, budgeting, and administration.

- Zoning Bylaw revisions, including farmland and aquifer protection bylaws, research park zoning, downtown and village center rezonings, mandatory cluster subdivision bylaw, reorganization of bylaw Directed & supervised all planning & community development projects/programs
- Comprehensive planning/visioning process for the community
- Developed and guided regionally recognized progressive affordable housing program
- Developed Strategic Plans for downtown, village centers, open space protection

DIRECTOR OF PLANNING & ZONING ADMINISTRATOR, BURLINGTON, VERMONT

Director of Planning for the largest city in Vermont. Responsibilities included administration of planning, land use, urban renewal and zoning issues.

- Author of first comprehensive Master Plan
- Drafted innovative zoning amendments
- Administration of urban renewal program
- Strategic studies, including community design, waterfront redevelopment plans, demographic data base report • Development review
- Zoning enforcement

EDUCATION

- University of Massachusetts at Amherst, Master of Regional Planning
- Providence College, Bachelor of Arts, History/English

PROFESSIONAL ACTIVITIES

AMERICAN PLANNING ASSOCIATION/AMERICAN INSTITUTE OF CERTIFIED PLANNERS - NATIONAL

- Inducted into the College of Fellows of the American Institute of Certified Planners 2006
- Co-Chair of the APA National Planning Conference – Boston 2011; Chair of 1998 Boston APA conference

- Region I Commissioner – American Institute of Certified Planners, 1998-2002
- Planning Accreditation Board Site Visitor Team member, 1998-present
- Past Chair, AICP Global Planning Task Force
- Speaker at yearly APA National conferences, 1992-present
- Conduct ethics training sessions for planners, planning commissioners and public officials
- Co-author, APA Webinar/CD Training Programs,
 - *Staffing the Effective Planning Commission;*
 - *Mastering Meeting Management;*
 - *Creating Successful Meetings;*
 - *Ethics for Planning Commissioners;*
 - *Managing Complex Relationships*

APA - STATE/REGIONAL

- Past President, Massachusetts Chapter, American Planning Association
- Chair, Mass. Chapter APA Sustainable Development Committee 2005 - present
- Speaker & trainer on a variety of planning, land use, zoning and ethics topics at 150+ conferences

OTHER ACTIVITIES

- Council Member - Boston Region Metropolitan Area Planning Council, 2006 - present
- Commissioner - Pioneer Valley Planning Commission 1985-2004
- AIA SDAT Team member – *Downtown & Gateway Corridor Revitalization Plan* – Port Angeles, Washington
- Co-founder, Vice President, Advisory Board member & a trainer for the Citizen Planner Training Collaborative, a statewide training program for planning & zoning boards, 1995- present. Conduct training sessions on topics that include zoning bylaws/ordinances, ethics, roles & responsibilities of land use boards, sustainable development, innovative zoning, meeting management, making & writing defensible decisions and land use tools.
- Past President, Massachusetts Association of Planning Directors

AWARDS

- Charles E. Downe Memorial Award for Distinguished Service
- Massachusetts Association of Planning Directors Award for Special Contributions to the Profession
- Massachusetts Chapter of APA, Distinguished Service Award (awarded twice)
- Distinguished Alumnus Award, UMass, Department of Landscape Architecture & Regional Planning
- American Planning Association - National Chapter Achievement Award
- Mass. Chapter APA 2009 President's Award - Executive Office of Housing & Economic Development — South Coast Rail Land Use & Economic Development Corridor Plan
- U.S. Environmental Protection Agency 2006 National Outstanding Achievement for Smart Growth - Executive Office for Commonwealth Development
- Mass. Chapter APA Outstanding Planning & Outstanding Project Awards - Amherst Planning Department

CERTIFICATE OF NON-COLLUSION FORM
TOWN OF ARLINGTON
ZONING BYLAW RECODIFICATION

The undersigned certifies under penalties of perjury that this bid or proposal has been made and submitted in good faith and without collusion or fraud with any other person. As used in this certification the word "person" shall mean any natural person, business, partnership, corporation, union, committee, club, or other organization, entity, or group of individuals.



Signature of Individual Submitting Bid or Proposal

Craig R. Seymour

Name of Individual Submitting Bid or Proposal

RKG Associates, Inc.

Name of Business

October 20, 2016

Date

BY STATE LAW THIS NON-COLLUSION FORM MUST BE SIGNED AND SUBMITTED WITH THE BID OR PROPOSAL.

CERTIFICATE OF TAX COMPLIANCE FORM
TOWN OF ARLINGTON
ZONING BYLAW RECODIFICATION

Pursuant to MGL Chapter 62C, Section 49A, I certify under the penalties of perjury that I have complied with all laws of the Commonwealth of Massachusetts relating to taxes, reporting of employees and contractors, and withholding and remitting child support.

02-0357052

Social Security Number or
Federal Identification Number


Signature and Title of Individual or
Responsible Corporate Officer

BY STATE LAW THIS CERTIFICATE OF TAX COMPLIANCE FORM MUST BE SIGNED AND SUBMITTED WITH
THE BID OR PROPOSAL.



CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)

7/1/2016

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERs NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

PRODUCER		CONTACT NAME: Deborah Gifford	
Cross Insurance 475C High Street		PHONE (A/C, No, Ext): (603) 742-2552	FAX (A/C, No): (603) 742-4509
Somersworth NH 03878		E-MAIL ADDRESS: dgifford@crossagency.com	
INSURED		INSURER(S) AFFORDING COVERAGE	
RKG Associates, Inc. 300 Montgomery St Ste 203 -MAIL ADDRESS		INSURER A:Excelsior	NAIC # 11045
Alexandria VA 22314		INSURER B:Peerless Ins Co	24198
		INSURER C:The Phoenix Ins Co	25623
		INSURER D:	
		INSURER E:	
		INSURER F:	

COVERAGES		CERTIFICATE NUMBER: CL1510552010		REVISION NUMBER:				
THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.								
INSR LTR	TYPE OF INSURANCE	ADDL INSD WVD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS	
A	X COMMERCIAL GENERAL LIABILITY CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR			CBP8090018	11/6/2015	11/6/2016	EACH OCCURRENCE \$ 1,000,000	DAMAGE TO RENTED PREMISES (EA occurrence) \$ 100,000
	GEN'L AGGREGATE LIMIT APPLIES PER: POLICY <input checked="" type="checkbox"/> PROJECT <input type="checkbox"/> LOC OTHER:						MED EXP (Any one person) \$ 10,000	PERSONAL & ADV INJURY \$ 1,000,000
							GENERAL AGGREGATE \$ 2,000,000	PRODUCTS - COMP/OP AGG \$ 2,000,000
							\$	\$
A	AUTOMOBILE LIABILITY X ANY AUTO ALL OWNED AUTOS <input type="checkbox"/> HIRED AUTOS <input type="checkbox"/>	SCHEDULED AUTOS NON-OWNED AUTOS		BA8096703	11/6/2015	11/6/2016	COMBINED SINGLE LIMIT (EA accident) \$ 1,000,000	BODILY INJURY (Per person) \$
							BODILY INJURY (Per accident) \$	PROPERTY DAMAGE (Per accident) \$
							Uninsured motorist combined \$ 1,000,000	
B	X UMBRELLA LIAB <input checked="" type="checkbox"/> OCCUR EXCESS LIAB <input type="checkbox"/> CLAIMS-MADE	DED <input checked="" type="checkbox"/> RETENTION \$ 10,000		CU8094719	11/6/2015	11/6/2016	EACH OCCURRENCE \$ 5,000,000	AGGREGATE \$ 5,000,000
							\$	\$
C	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below	Y/N <input checked="" type="checkbox"/> N/A		INUB1C95685415	11/6/2015	11/6/2016	X PER STATUTE \$ 500,000	OTH-ER
							E.L. EACH ACCIDENT \$ 500,000	
							E.L. DISEASE - EA EMPLOYEE \$ 500,000	
							E.L. DISEASE - POLICY LIMIT \$ 500,000	

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)
Project: Defense Industry SWOT Analysis, as subcontractor to Baatra

EXAMPLE

CERTIFICATE HOLDER

CANCELLATION

crs@rkgassociates.com		SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.
Massachusetts Development Finance Agency 99 High Street, 11th Floor Boston, MA 02110		AUTHORIZED REPRESENTATIVE
		Deborah Gifford/DG5 

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